

## Fleet Management System Requirements Definition Working Document

This document is a compilation of system requirements defined by multiple agencies. It is expected the document will change regularly as discussions for a fleet management system progress and requirements are more concisely defined.

### GENERAL

1. Bar coding capability
2. Benchmark maintenance/replacement/transfer parameters by internal need
3. Flexibility to adapt program to fleet needs
4. Network compatibility with centrally stored database
5. Vehicle details (purchase, insurance, disposal, etc.)
6. Attachments (GIF, JPG, PDF, DOC, XLS, etc.) to a vehicle (i.e. accident reports)
7. System must be easy to use by
  - a. Operator
  - b. Clerical staff
  - c. Fleet manager
  - d. PCA leaders
  - e. Billing staff
  - f. Data entry staff
8. System must accommodate complex account coding
9. System must have appropriate security
  - a. Ability to limit access by user type/group
  - b. Daily backups
  - c. Recovery
10. Ability to make changes to billing data, both current and historical
  - a. PCAs charges
  - b. Default PCA
  - c. Responsible PCA
  - d. Monthly and unit billing rates
11. Real time error detection for data input and charge processing
12. Maintain complete records on disposed vehicles
13. Accommodate and track use of non-fleet owned vehicles
14. Ability to suspend monthly billing during periods of inactivity (vehicle is not being used)
15. Include most motorized equipment
  - a. Cars
  - b. Trucks
  - c. ATVs
  - d. Motorcycles
  - e. Snowmobiles
  - f. Outboard motors
  - g. Inboard boats
  - h. Forklifts
  - i. Bulldozers
  - j. Cranes, etc.

16. Support bulk fuel operations where fuel is dispensed from agency owned tanks
17. Support maintenance billing from agency maintenance staff and warehouse operations
18. Support motor pool operations
19. Ability to manage changes in class codes, rental rates, usage codes, etc.

#### INVENTORY DATA

1. Make
2. Model
3. Year
4. VIN
5. Cost
6. Date of issue (?)
7. Scheduled replacement date
8. GVWR
9. Inventory control number
10. License plate number
11. Type of vehicle
12. Service profile
13. Odometer
14. Department assignments (vehicle locations?)
15. Unit identifier
16. Department contact person
17. Area of primary use
18. Engine type/size
19. Alternate fuel (LPG/Hybrid/E85/Diesel, etc.)
20. Fuel capacity and type
21. Transmission/power train type
22. Warranty provisions
  - a. Bumper to bumper
  - b. Power train
  - c. Emission control systems
23. Classification by type (industry recognized)
  - a. GVW
  - b. Design
  - c. Axle configuration, etc.
24. Classification by use (internal designations)
  - a. Administrative pool
  - b. Service pool
  - c. Motor pool
  - d. Internal lease with terms
  - e. Vendor lease with terms
25. Insurance state: APD or liability only
26. Filter, lube, oil specs, etc.
27. Ancillary equipment assigned to vehicle (life gates, racks, storage, hoists, etc.)
28. Tire data (size, make manufactures, load range)

## 29. Odometer/operating hours

### UTILIZATION DATA

1. Days used
2. Mileage
3. Trips
4. Miles per gallon consumption
5. Total fuel by vehicle, class, department
6. Internal charge back billing capability (People Soft/Oracle)
7. Accommodate shared vehicle use by multiple individuals on multiple projects
8. Total cost per mile
9. Automated scheduling system for personnel
  - a. Online, real-time vehicle reservation
  - b. Vehicle type
  - c. Destination
  - d. Duration
  - e. Accounting codes
10. Trip data
11. Accident data (who, where, when, how)
12. Vehicle acquisitions (also in cost category) (?) and disposals

### MAINTENANCE

1. Automatic preventative maintenance (PM) tracking based on calendar and mileage or hours
2. Notification of overdue maintenance items
3. Automatic PM work order generation, by PM schedule criteria and mileage/hour established benchmarks
4. Last service date and mileage
5. PM parts listing for each vehicle (type of oil, filter, etc.)
6. PM and repair history tracking
7. PM parts inventory tracking (bar coding preferred)
8. Parts warranty tracking
9. Tire inventory and replacement tracking
  - a. Miles of use (proper selection of tire to application)
  - b. Months of use (quality of selection-material degradation before wear limit is reached)
10. Track in-house service/repair vs. outsourced

### COST, AUDIT/CONTROL DATA

1. Total operating costs (including PCA or index): depreciation, operating, administrative, overhead, fuel, etc. (Current at any time a query is requested.)
  - a. By make, model, year, etc.
  - b. By classifications
  - c. By task
  - d. By department
  - e. By miles, hours, month, year, life cycle

2. Ability to assign a property to a primary user/location
3. Default chargeable PCA for non-use periods
4. Allocate charges to user's PCA's
5. Ad hoc reporting
  - a. Group vehicles by users or purchase dates
  - b. Sum of miles/hours/days used by location
  - c. Vehicle age by class
  - d. Average mpg by class by location
  - e. Average sale price by class, age, mileage, date of sales, etc.
  - f. Accident reporting
6. Costs by mile/hour
  - a. PM
  - b. Non PM
  - c. Tires
  - d. Fuel
7. Depreciation (methods?)
8. Miles/hours/days of use (historical by day, month, year)
  - a. By vehicle
  - b. By internal classifications (administrative, service, motor pool)
  - c. By type of use (internal classification HVAC, electrical, maintenance, etc.)
9. Fuel cost/consumption
  - a. By department
  - b. By vehicle class and use
  - c. By make, model, etc.
  - d. Integration with Wright Express
10. Preventative maintenance costs
11. Unscheduled maintenance costs
12. Vendor out source repair (non-warranty) costs
  - a. Major component replacement and repair
  - b. Air conditioning
  - c. Performance/drive-ability
  - d. Tires
  - e. Suspension/braking systems
  - f. Electrical systems and sub-systems (computer controls)
13. Tire replacement costs
14. Accident damage costs
15. Avoidable damage/incidental damage repair (expected wear and tear associated with type of use)
16. Windshield replacement and repair costs
17. Battery costs
18. Towing
19. Maintenance materials (filters, belts, etc.)
20. Vendor warrant repair/recalls
21. Lease revenue and costs
  - a. Internal leases/rental agreements

- b. Vendor leases
- 22. Cleaning
- 23. Parts vendor cumulative costs
  - a. By vehicle make, type, class
  - b. By history (inflationary)
- 24. Tool and equipment purchase costs related to maintenance and repair of vehicles
- 25. Technical training history and costs
- 26. Overhead costs
  - a. Administrative
  - b. OSHA compliance
  - c. Waste disposal
  - d. Utilities, etc.
- 27. Analytical tools to assess optimum replacement time, salvage values
  - a. Integration with vehicle valuation databases and tools – Chrome, NADA, etc.

#### REPAIR SHOP

- 1. Risk management
- 2. Vendor information
- 3. Accident data
- 4. Repair estimates
- 5. Salvage company information
- 6. Tool inventory

#### SYSTEM INTEGRATION/COMPATIBILITY

- 1. Wright Express
- 2. P-Card
- 3. WEX
- 4. Financial systems
  - a. Fiscal
  - b. People Soft
  - c. Oracle
  - d. Navision
  - e. STARS/FAS
    - i. Vehicle billing data
    - ii. Accounts payable charges
    - iii. Reconciliation
  - f. Maintenance vendors
  - g. Excel spreadsheets
- 5. Statewide network of data entry points for vehicle use information
- 6. Risk Management

#### PRICING, SERVICE & SOFTWARE DELIVERY

- 1. Application service provider models
- 2. Maintenance
- 3. Lease to own, Own to maintain, etc.

#### 4. Implementation and training